

 **SchoolMint** Enroll

1.3 Amazing Features

REGISTRATION & RE-ENROLLMENT

Feature Walk-Through / Product & Engineering

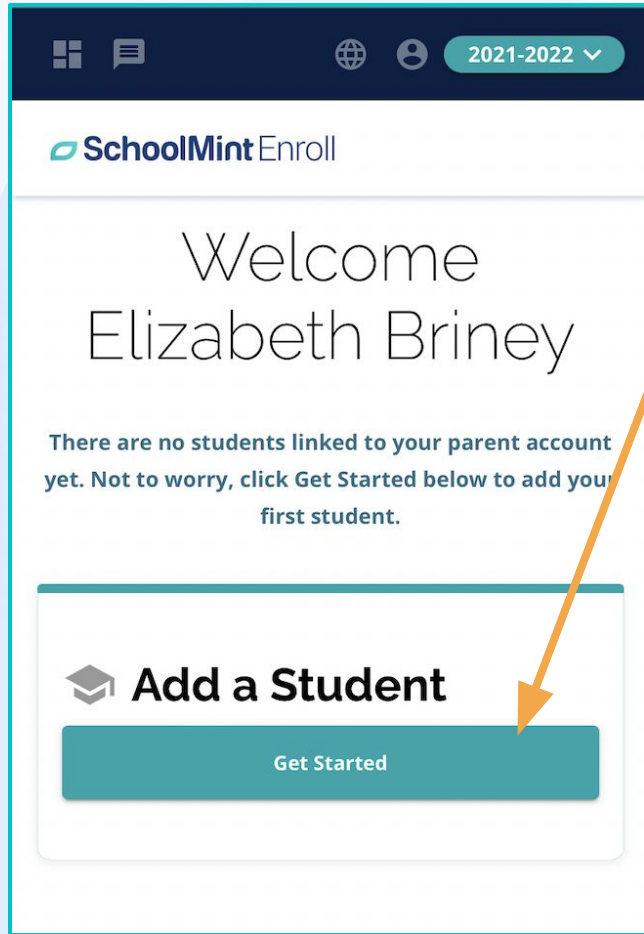


1. Updated Flow for all Enroll processes

Parents now create the student record first by filling out a Student Information card. Eligibility rules will then determine which Enroll process (Apply, Register, Re-register) to display based on the student's information




Conditional Enroll Flow - Starting the process



SchoolMint Enroll

Welcome
Elizabeth Briney

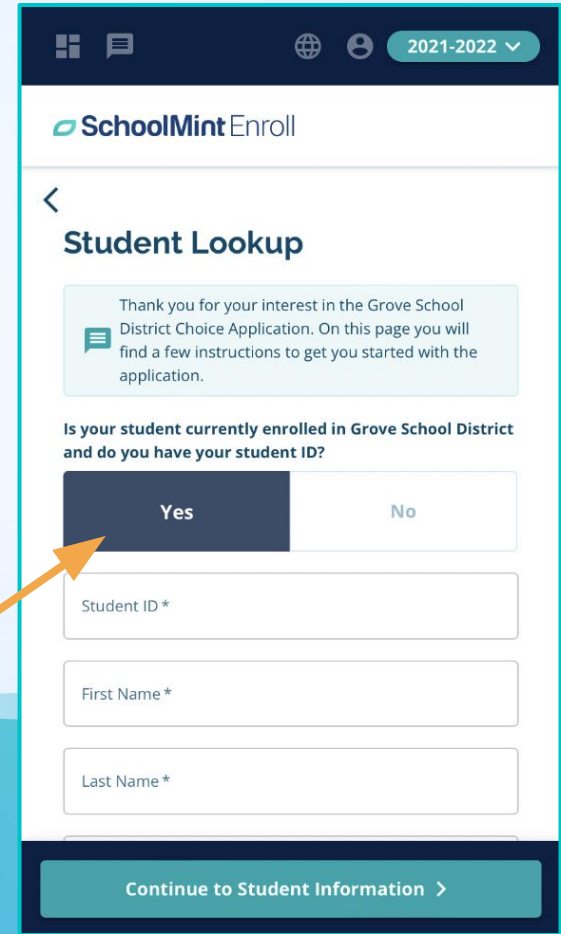
There are no students linked to your parent account yet. Not to worry, click Get Started below to add your first student.

 **Add a Student**

Get Started

**New parent with
no students Click
Get Started**

**Complete the
Student Lookup**



SchoolMint Enroll

< **Student Lookup**

Thank you for your interest in the Grove School District Choice Application. On this page you will find a few instructions to get you started with the application.

Is your student currently enrolled in Grove School District and do you have your student ID?

Yes No

Student ID *

First Name *

Last Name *

Continue to Student Information >

Conditional Enroll Flow - Student Information Form

SchoolMint Enroll

< Student Information

To begin the application process, please provide us with information about the student.

First Name *
James

Last Name *
Briney

Date of Birth *
01/01/2010

Grade Level *
6

Student Home Address
129 East Kaliste Saloom Road

Student Home Address 2

Student Home Address City
Lafayette

Student Home Address State
LA

Student Home Address Zip Code
70508

Current School
Applewood Elementary School

Save & Exit Save & Continue >

Complete the Student Information Form

- This form will create the student record
- Determine a student's eligibility.
- Add fields to configure based on org needs.

First Name *
James

Last Name *
Briney

Date of Birth *
01/01/2010

Grade Level *
6

Student Home Address
129 East Kaliste Saloom Road

Student Home Address 2

Student Home Address City
Lafayette

Student Home Address State
LA

Student Home Address Zip Code
70508

Conditional Enroll Flow - Accordions Page

2021-2022

SchoolMint Enroll

Select Enrollment Type

Please select the type of form you would like to submit.

Register to a New School

East West Middle

Address: 119 Lake Farm Road, Lafayette

Grades: 6 to 8

Register

Apply to More Schools

Accordions will display the Enroll options based on the students' eligibility

2021-2022

SchoolMint Enroll

Select Enrollment Type

Please select the type of form you would like to submit.

Apply to More Schools

Choice Application

Start

Transfer Request

Start

2021-2022

SchoolMint Enroll

Select Enrollment Type

Please select the type of form you would like to submit.

Re-Register at Your Current School

East West Middle

Address: 119 Lake Farm Road, Lafayette

Grades: 6 to 8

Re-Register

Apply to More Schools

Conditional Enroll Flow - Completing the Form

SchoolMint Enroll

2021-2022

Select Enrollment Type

Please select the type of form you would like to submit.

Apply to More Schools

Start

Transfer Request

Start

Select the form to complete

SchoolMint Enroll

2021-2022

1. Guardian Information

2. School Choice

3. Rank Choices

4. Signature

5. Review and Send

Guardian Information

Next: School Choice

To begin the application process, please provide us with information about the student.

Guardian First Name*

Guardian Last Name

Guardian Address

100 Winchester Drive

Guardian Address 2

Guardian Address City

Lafayette

Save & Exit

Save & Continue >

Complete the form process

SchoolMint Enroll

2021-2022

1. Guardian Information

2. School Choice

3. Rank Choices

4. Signature

5. Review and Send

Review and Send

General Information

Student Name

Marlon Washington

Enrollment Year

2021 - 2022

Grade level

6

School(s) Applying To:

Choice Schools

Choice 1

East West - IB Program

Choice 2

East West Middle - Dual Language

1. Guardian Information

Guardian First Name

Exit

Submit Application >

Conditional Enroll Flow - Dashboard Updates

The dashboard displays a list of student profiles under the heading "Welcome Michael Abbott". Each profile card includes a name, a status indicator, and a list of application forms. Callout boxes provide instructions for various UI elements:

- Take parent to Student Profile to view/ manage submitted forms:** Points to the "View Submitted Forms" button on Katherine Abbott's profile.
- Use '+' button to add more forms:** Points to the "+" button on Katherine Abbott's profile and the "Add More Form(s)" button on Michael Jr. Abbott's profile.
- No submitted forms only forms in progress:** Points to the "Continue" button on Michael Jr. Abbott's profile.
- Edit the Student Information Form:** Points to the pencil icon next to Daniel Abbott's name.
- Student with no forms will see an Add Form(s) button:** Points to the "Add Form(s)" button on Lorenzo Abbott's profile.

Student Profile Details:

- Katherine Abbott:** Eligible to Register. 5 Applications Submitted. View Submitted Forms (2). Application Name In Progress (2).
- Michael Jr. Abbott:** Choice Application In Progress. Continue.
- Lorenzo Abbott:** No records for the 2021-2020 school year. Add Form(s).
- Daniel Abbott:** No records for the 2021-2020 school year. Add Form(s).

How do I set up this feature?

- Enable flag
- Create Eligibility Rules
- Set Rules for Schools and School Group

Conditional Enroll Flow - Enable the Feature

Elizabeth Briney | Poboy Academy

My Account School Year 2021-2022

Always Keep Lottery Lists Grouped by Priority Groups

Allow Sharing of Waiting List Numbers

Randomization
 Randomize at Runtime

Allow Parents to Accept/Decline Waiting List Placements

Sync Service Settings

Sync Service Imports - Disable updates from import data after application or enrollment form has been started

Sync Service Imports - Disable updates from import data after enrollment is exported

Enrollment Settings

Enable consolidated flows for registration

Check this setting to enable

Sibling Settings

Move Linked Siblings to Accepted List when Offered Placement

Move Linked Siblings to Top of Waiting List when Offered Placement

Move Linked Siblings Only when Accepting Placement

Place Twins/Multiples Together

Sibling Linking Restriction
 Same Program Only

Sibling Movement Position
 Relative to Original Ranking

Save Internal Settings




Need Help?

Configure Student Information Form

Student Information Form Fields

[Back to All Steps](#)[Add Form Field](#)

Manage Form Fields. [Student Information](#)

Order	Form Field Label	Type	Attributes	Actions
=	* First Name students.fname	Text	Required: Parent / Admin Disabled:	   
=	* Last Name students.lname	Text	Required: Parent / Admin Disabled:	   
=	* Grade Level student_annual.grade	Dropdown	Required: Parent / Admin Disabled:	   
=	* Date of Birth students.dob	Date	Required: Parent / Admin Disabled:	   
=	Student Home Address student_annual.address	Address	Required: Disabled:	   
=	Current School student_annual.school_previous_id	Dropdown	Required: Disabled:	   

This is a required field for this process and cannot be deleted

- Single Step Form
- First Name, Last Name, DOB and Grade cannot be deleted
- Form fields can be added based on org's requirements and eligibility rules

Conditional Enroll Flow - Create Rules

Eligibility Rule/Restriction: Add New

Cancel

Save Rule

Rule Information

Rule Name *

Re-registration Rule

Rule Description:

ReRegistration eligibility rule



Student is eligible if **ANY** **ALL** of the conditions below are met

Student Is

Operator

CONTINUING

Feeder Path



Add Condition

Add Nested Group

Create Rule(s) based on the orgs eligibility conditions

Eligibility Rules/Restrictions

Configure rules and restrictions to control which schools and programs students are eligible to apply or enroll.

Search Rules



Add New Rules

Rule Name	Description	Actions
Registration	Eligibility rule for registration	
Re-registration Rule	ReRegistration eligibility rule	

Conditional Enroll Flow - Assign Rules

Manage Schools & Programs

Settings > Schools Programs > Schools > Alex Horn High

Alex Horn High: Edit

Cancel Save School

PRIMARY SCHOOL ELIGIBILITY REGISTRATION SETTINGS FEEDER SCHOOLS

Eligibility Rule/Restriction
Registration

Boundary Settings
Select Shape File

Cancel Save School

Eligibility rules for registration set at the school level

Eligibility rules for re-registration set at the school group level

Default Rule for Re-registration:
student remaining in current school
This can be updated based on the org's
need.

Manage Schools & Programs

Settings > Schools Programs > School Groups > Poboy Academy

Poboy Academy: Edit

Cancel Save Group

Group Information
Group Name* Poboy Academy Group Code* 100

District Boundary
Select Shape File

Re-Registration Rule
Select Re-Registration Rule
Re-registration Rule

Troubleshooting Tips

- If the guardian is not directed through the flow as described ensure that the setting `Enable consolidated flows for registration` is checked (enabled).
- If re-registrations options did not appear for the student ensure that:
 - The student matches the eligibility rules
 - Re-registration dates are open
 - The grade for the student is an option at the school they expect to re-register to
- If registrations options did not appear for the student ensure that:
 - The student matches the eligibility rules
 - Registration dates are open
 - The grade for the student is an option at the school they expect to register to
- If application options did not appear for the student ensure that:
 - Application dates are open
 - The grade for the student is an option at the school they expect to apply to

Known Issues

- The apply flow is not configured based on eligibility rules. All available application processes will display to the student based on grade and if the application dates are open. This is a planned feature enhancement.

2. New Rules Engine Rules

New out of the box rules available to admins in the Rules Engine



New Rules Engine Rules - Conditions

**New
conditions**

Student is eligible if **ANY** **ALL** of the conditions below are met

Add Condition ▼

Add Nested Group

Simple Lookup

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Cancel

Save Rule

New Conditions allow admins to create rules based on:

- **A student continuing in their current school**
- **A student continues in their feeder path**

These conditions allow admins to configure rules for re-registration, registration, applications and lottery.

New Rules Engine Rules - Student in Current School

Student is eligible if **ANY** **ALL** of the conditions below are met

Student School	<div style="border: 2px solid orange; padding: 5px;"><p>Operator</p><p>IS</p><p>IS NOT</p></div>	Same School <input type="button" value="X"/>
----------------	--	--

Condition: Student School

Operator:

- IS = the student's `school_previous_ID` matches the school applying/registering/ re-registering
- IS NOT = the student's `school_previous_ID` DOES NOT match the school applying/registering/ re-registering

Expected Value: Same School

New Rules Engine Rules - Student Continues Feeder Path

Student is eligible if **ANY** **ALL** of the conditions below are met

Student Is

Operator

CONTINUING

NOT CONTINUING

Feeder Path



Add Condition ▼

Add Nested Group

Condition: Student Is

Operator:

- CONTINUING = the student's `school_previous_ID` matches the feeder pattern set for the school applying/registering/ re-registering
- NOT CONTINUING = the student's `school_previous_ID` DOES NOT match the feeder pattern set school applying/registering/ re-registering

Expected Value: Feeder Path

How do I set up this feature?

Great news - this feature is out of the box and will be available upon install of any new org. Any existing orgs will see this feature available upon the general release of v1.3

Troubleshooting Tips

- If using the student continues in their feeder path condition ensure that feeder paths are set correctly
 - EXAMPLE: East West Middle is the feeder school for North South High School. Your setup should have the Middle School selected as the feeder school under the High School
- You did not use the field `school_previous_ID` to determine the student in current school eligibility.
- You did use the field `school_previous_ID` BUT entered fields manually and did not use school IDs

North South High: Edit

PRIMARY SCHOOL ELIGIBILITY REGISTRATION SETTINGS FEEDER SCHOOLS

Select other schools that feed into this school:
These can be used to determine re-registration schools based on a student's Current School

Search schools

Select Schools

Elementary

Pop School

ABBA Academy

Selected Feeder Schools

Middle

East West Middle

Student Details: Add Field

Field Parameters

Field Type*
Dropdown

Field Label*
Current School

Field Description/Note

Required Required Admin

Data Settings

Span 1*
Student Annual

Field Name*
school_previous_id

Field Options

Data Source
Enter Manually Below

Include "None" option

Include "Other" option

Other Placement
Bottom

Order	Option Value	Label (only if different than value)	Default Value	Actions
1	ABClem	ABC Elementary		<input type="button" value="+"/> <input type="button" value="X"/>

4. Guardian SSO

Guardians can now create an account and login via Facebook and Google SSO



Video Walk Through

English

Phone Number

Preferred Language *

English

Preferred Communication *
*Select At Least One**

Enable SMS Text Notifications

By enabling SMS Text notifications you agree to receive informational account messages such as application, enrollment and school lottery alerts, status updates, and important emergency alerts. Msg&data rates may apply. MsgFreqVaries. Text HELP for help or STOP to opt-out. Powered by SchoolMint.

Enable Email Notifications

[Privacy Policy](#) [SMS Terms](#)

Create account

If I'm interested but want more information, where can I go?
Call or visit the Magnet Program you are interested in, or call the Magnet Program Office at 303.260.8888. Mailing address: 1150 E. Colfax Ave., Denver, CO 80202. Fax: 303.260.8888.

Powered by SchoolMint

- Guardians have the option to create an account / login via Facebook and Google SSO
- When creating an account with SSO the Guardian will see an Almost There page to complete required fields for account creation.
- Guardians have the ability to unlink their SSO account if needed.

Guardian SSO - Facebook and Google SSO

SchoolMint Enroll

Parent Log In

Need an account? [Create an account](#)

Enter Email or Phone Number*

Enter Password*

Login

Continue with Facebook

Continue with Google

[Forgot password?](#) | [Can't find account](#)

Keep me signed in

New
SSO
Buttons

SchoolMint Enroll

Get started with your account

Already have an account with us? [Log in](#)

Continue with Facebook

Continue with Google

Or

Guardian First Name*

Guardian Last Name*

Please Enter Mobile Number or Email*

Phone Number

Guardian Email

Confirm Email

Guardian SSO - Creating an Account

SchoolMint Enroll

Get started with your account

Already have an account with us? [Log in](#)

Continue with Facebook

Continue with Google

Create account using SSO

Collect required communication details

SchoolMint Enroll

Almost There

Please complete additional information below

Phone Number

Preferred Communication*
*Select At Least One**

Enable SMS Text Notifications

Enable Email Notifications

Privacy Policy

Preferred Language*
English

Create account

Update language preference

Guardian SSO - Guardian Dashboard

2021-2022

SchoolMint Enroll

Welcome Elizabeth Briney

There are no students linked to your parent account yet. Not to worry, click Get Started below to add your first student.

Add a Student

Get Started

Logged in with no student(s) linked to account

Logged in with student(s) linked to account

2021-2022

SchoolMint Enroll

Welcome Elizabeth Briney

Click the child's card to manage Poboy Academy applications and enrollment forms.

Henry LeBlanc

Lottery Application In Progress Continue

Guardian SSO - Unlinking an SSO account

SchoolMint Enroll

My Account

Use the form below to update your account.


Guardian First Name *
Elizabeth

Guardian Last Name *
Briney

Phone Number

Guardian Email *
elizabeth.briney@schoolmint.net

Preferred Language *
English



Preferred Communication

Enable SMS Text Notifications

Enable Email Notifications

[Privacy Policy](#)

Save Changes

SchoolMint Enroll

My Account

Use the form below to update your account.

Guardian First Name *
Elizabeth

Guardian Last Name *
Briney

Phone Number

Guardian Email *
elizabeth.briney@schoolmint.net

Preferred Language *
English

Unlink Single Sign-On Account

Please confirm you want to unlink your single sign-on account. This cannot be undone and you would need to create and confirm a password.

Enable Email Notifications

[Privacy Policy](#)

Save Changes

Password input required when SSO is unlinked

SchoolMint Enroll

My Account

Use the form below to update your account.


Guardian First Name *
Elizabeth


Guardian Last Name *
Briney

Phone Number

Guardian Email *
ejbriney@gmail.com

Preferred Language *
English

New Password * 

Password Confirmation * 

Preferred Communication

Enable SMS Text Notifications

Enable Email Notifications

[Privacy Policy](#)

Save Changes

Guardian SSO - Admin View

Manage Users

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Sync Service

Guardian Accounts

Update guardian account information.

Bulk Action

Guardian Accounts Using SSO will display with the SSO icon

ID	Guardians Name	Email	Phone	SSO	Actions
<input type="checkbox"/> 9767...	null null	sync.service@schoolmint.net			<input type="text"/>
<input type="checkbox"/> 9767...	Elizabeth Briney	elizabeth.briney@schoolmint.net	3333333333		<input type="text"/> Login
<input type="checkbox"/> 9883...	Alexander Ledet	alexander.ledet@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9883...	Ryan McFarland	ryan.mcfarland@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9884...	Mario Gomez	mario@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9884...	Jimmy Bean	jimmy.bean@aol.com			<input type="text"/> Login
<input type="checkbox"/> 9923...	Steven Arguedas	steven.arguedas@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9963...	Jose Vasquez	jose.vasquez@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9965...	Jorge Zavala	jorge.zavala@schoolmint.net			<input type="text"/> Login
<input type="checkbox"/> 9967...	Alvin Lewis	alvin.lewis@schoolmint.net			<input type="text"/> Login

How do I set up this feature?

Great news - this feature is out of the box and will be available upon install of any new org. Any existing orgs will see this feature available upon the general release of v1.3

Troubleshooting Tips

- The most frequent support request we have seen for this is when a guardian forgot they logged in via SSO and now cannot proceed.
 - Admin can view the Guardian Accounts page to confirm how the parent logged in.
 - If the guardian needs help unlinking their SSO account the admin can use the login as guardian button to access the guardian's account and assist them with unlinking the account from the My Account page
- A guardian will not be able to create multiple accounts using matching email addresses, or phone numbers.
- A guardian can sign in again to an account they unlinked if the email matches the email address used for the SSO provider.

Known Issues

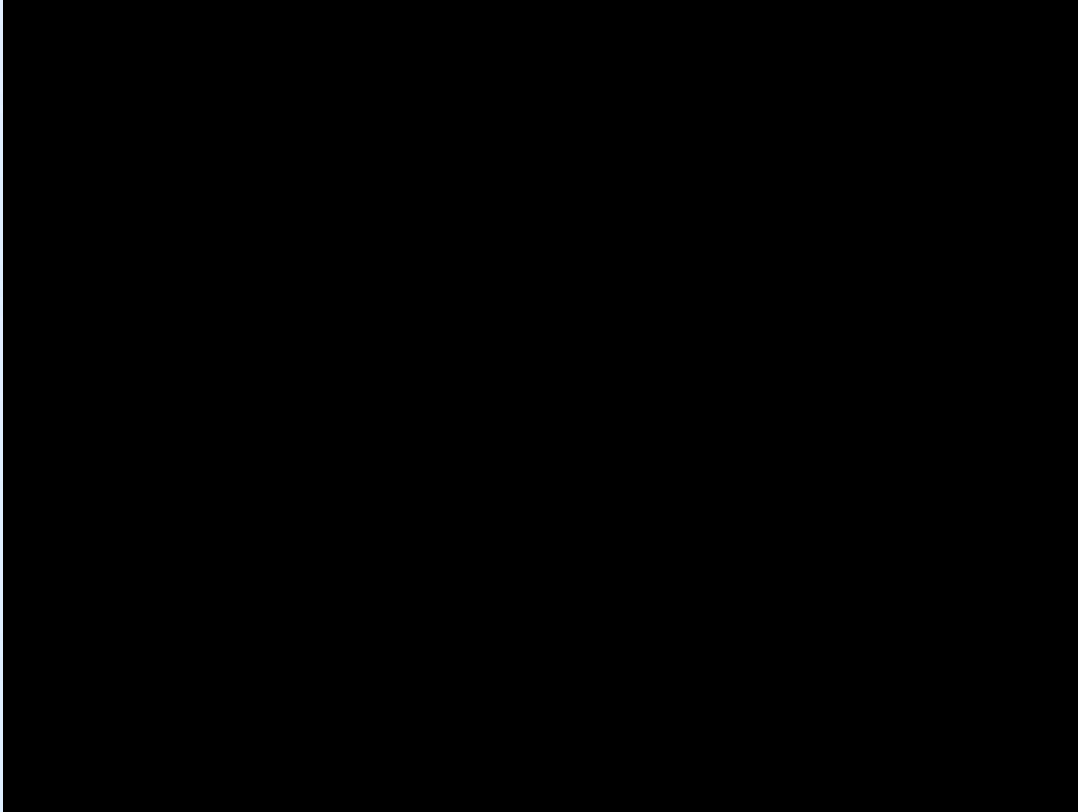
- Admins are not able to unlink a guardian account via the admin side; this is a planned future feature enhancement.

5. Manage System/Platform Content

Update and override default text throughout the system and corresponding translations (FKA Content Snippets/Terms in SC, i18n Overrides in SM)



Video Walk Through



- Admins/CS/IPMs can update system default content
- Can update English text as well as the corresponding translations
- This can update both the Parent AND the Admin facing pages

Manage System/Platform Content - Settings Option

Sean Finerty | Olive Academy My Account School Year 2021-2022

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Content Letters

Content/Letters

New option added under Content/Letters tab

Manage Notifications, letters and content snippets templates used throughout the system.

Email and Text Templates >

Manage System/Platform Content >

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Sync Service
- Boundaries

Manage System/Platform Content - Update Text

Sean Finerty | Olive Academy

My Account School Year 2021-2022

SchoolMint Enroll

Dashboard Students Applications Placements Registrations Reports Scheduling Users

Settings Content Letters System Platform Content

Content/Letters

General

Schools/Programs

Date & Time

Placements

Content/Letters

Custom Data

Forms

Guardian Theme

Sync Service

System/Platform Content

Manage system content and text used throughout the system.

Search lotteries

EN ES TL **YO** VI PL AR ZH UR

When there is an override - a tooltip alert shows

Search for text to update - Can search based on Key, Default, Override

Default English text will always show Current text will show on right and new override can be typed in

Key	Default Text	Override EN
navBar.admin.lottery	<i>i</i> Lotteries	Placements
settings.title.lotteries	<i>i</i> Manage Lotteries	Manage Placements
settings.tab.lotteries	<i>i</i> Lotteries	Placements
settings.lotteries.manageLotteries	Manage lottery priorities, priority groups and settings.	Manage lottery priorities, priority groups and settings.
settings.lotteries.pageName.lottery-priorities	Lottery Priorities	Lottery Priorities

Manage System/Platform Content - Update Text Example

System/Platform Content

Manage system content and text used throughout the system.

Search:

EN ES TL YO VI PL AR ZH UR

Key	Default Text	Override EN
parent.student_information.lookup.info	Thank you for your interest in the {org} Choice Application. On this page you will find a few instructions to get you started with the application.	Thank you for your interest in the {org} Choice Application. On this page you will find a few instructions to get you started with the application.
parent.apply.getStarted.info	<p>i Thank you for your interest in the {org} Choice Application. On this page you will find a few instructions to get you started with the application. Before beginning the application, we ask that you read our Requirements & Policies.</p>	Thank you for your interest in attending a school at {org}. An application is not a guarantee of admission

Updated Content Saved for Parent Flow



SchoolMint Enroll

< Get Started

Next: Student Information (OE Version)

Thank you for your interest in the Olive Academy Choice Application. On this page you will find a few instructions to get you started with the application. Before beginning the application, we ask that you read our Requirements & Policies.

School Year

2021-2022

Student Lookup

Is your student currently enrolled in Olive Academy and do you have your student ID?

Yes No

Student ID *

First Name *

Continue to Application >

SchoolMint Enroll

< Get Started

Next: Student Information (OE Version)

New override text is shown

Thank you for your interest in attending a school at Olive Academy. An application is not a guarantee of admission

School Year

2021-2022

Student Lookup

Is your student currently enrolled in Olive Academy and do you have your student ID?

Yes No

Student ID *

First Name *

Last Name *

Continue to Application >

Manage System/Platform Content - Reset to Default

Sean Finerty | Olive Academy My Account ▾ School Year 2021-2022 ⌵ ⚙

SchoolMintEnroll Dashboard Students Applications Placements Registrations Reports Scheduling Users

Settings > Content Letters > System Platform Content

Content/Letters

- General
- Schools/Programs
- Date & Time
- Manage Users
- Placements
- Content/Letters**
- Custom Data
- Forms
- Guardian Theme
- Sync Service
- Boundaries
- Internal

System/Platform Content

Manage system content and text used throughout the system.

Search:

EN ES TL YO VI PL AR ZH UR Delete override and save to revert to default text!

Key	Default Text	Override EN
navBar.admin.lottery	Lotteries	<input type="text"/>
settings.title.lotteries	Manage Lotteries	<input type="text"/>
settings.tab.lotteries	Lotteries	<input type="text"/>
settings.lotteries.manageLotteries	Manage lottery priorities, priority groups and settings.	<input type="text" value="Manage lottery priorities, priority groups and settings."/>
settings.lotteries.pageName.lottery-priorities	Lottery Priorities	<input type="text" value="Lottery Priorities"/>
settings.lotteries.pageName.designs	Lottery Designs	<input type="text" value="Lottery Designs"/>
settings.lotteries.pageName.settings	Lottery Settings	<input type="text" value="Lottery Settings"/>

How do I set up this feature?

Great news - this feature is out of the box and will be available upon install of any new org. Any existing orgs will see this feature available upon the general release of v1.3

Troubleshooting Tips

- There are at times multiple strings with similar text. You can look at the keys to see what page they are on
- There a lot of different strings, try to input as much as you can in the search bar to filter
- Search filter only includes the keys and the english default text
- Currently there is no way to import overwritten text
- Currently there is no way to filter by only overwritten text

6. Lottery Groups and Subgroups

When wanting to balance seats and waitlists by student type and demographic, we can now split the apps into custom groups. The groups can now be configured in the UI instead of using the Custom Layer



Key Points

- If you need to split lotteries into custom groups, you can use this Custom Lottery Group feature
- This was done a lot in SC, but with the custom layer - now we can create and update groups using the rules engine!
- This differs from quotas/%limits in that it creates dedicated offered and waitlists for each group

How do I set up this feature?

To configure the custom groups

1. Be sure to review the logic and desired lottery functionality with client.
Ask the same questions you would as when creating a lottery spec
2. Turn on Custom Lottery Groups
3. Set up the Groups and the logic in the Rules Engine
4. Set up the Group Design using the created groups
5. Assign the Group Design to programs
6. Set Cutoff Numbers
7. Run Lottery

Configure Lottery Groups - Internal Setting

← → ↻ olive.dev.schoolmint.com/manage/settings/internal

Sean Finerty | Olive Academy

My Account School Year 2021-2022

Languages

Languages

English Spanish Tagalog Yoruba

Vietnamese Polish Arabic

Chinese Simplified Urdu

Lottery Settings

Lottery Emails

Send an email per application

Enable Steps after Lottery Acceptance or Declination

Always Keep Lottery Lists Grouped by Priority Groups

Randomization

Randomize at Runtime

Enable Waiting List Caps

Enable Custom Lottery Groups

Allow Sharing of Waiting List Numbers

Allow Parents to Accept/Decline Waiting List Placements

New Setting in Internal Settings > Lottery Settings

Configure Lottery Groups - Lottery Settings

Sean Finerty | Olive Academy My Account ▾ School Year 2021-2022 ▾ ⚙

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Lotteries

Manage Lotteries

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries**
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Sync Service

Manage lottery priorities, priority groups and settings.

These are available when the Lottery Groups setting is turned on

Lottery Priorities >	Lottery Designs >
Lottery Groups >	Lottery Group Designs >
Lottery Cutoff Numbers >	Lottery Settings >

Configure Lottery Groups - Manage Lottery Groups

Sean Finerty | Olive Academy My Account School Year 2021-2022

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Lotteries > Lottery Groups

Manage Lotteries

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Sync Service

Boundaries

Internal

Migration Import

Lottery Groups

Add, edit and delete lottery groups

Manage Groups Designs

Search

Group Name	Description	Actions
Chocolate	Lottery group for students who like Chocolate Ice Cream	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
General Lottery	Default fallback group for all students and applications	
Strawberry	Lottery Group for students who like Strawberry Ice Cream	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Vanilla	Lottery group for students who like Vanilla Ice Cream	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

As Lottery Groups are added, they will be added to this table

A default General Lottery group will be loaded for all orgs and cannot be edited or deleted

Need Help?

Configure Lottery Groups - Configure Group Logic

Sean Finerty | Olive Academy My Account School Year 2021-2022

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings Lotteries Lottery Groups Chocolate

Manage Lotteries

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries**
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Sync Service
- Boundaries
- Internal
- Migration Import

Chocolate: Edit

Group Name *
Chocolate

Description
Lottery group for students who like Chocolate Ice Cream

Cancel Save Lottery Group

Configure Logic for Lottery Group

Match **ANY** ALL of the following conditions

Lookup Field	Operator	Expected Value
ice_cream_flavor_3	IS	CHOC

Add Condition Add Nested Group

Cancel Save Lottery Group

Name group to use when creating group design and also to display in Cutoff Numbers and View Lottery Run pages

Description is optional and just to help know what the group is for

Set up rules to sort apps into groups using the rules engine

Need Help?

Configure Lottery Groups - Manage Lottery Group Designs

olive.dev.schoolmint.com/manage/settings/lotteries/lottery-group-designs

Sean Finerty | Olive Academy

My Account School Year 2021-2022

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings Lotteries Lottery Group Designs

Manage Lotteries





Lottery Group Designs are added to this table

Lottery Group Designs

Add, edit and delete lottery group designs

Manage Cutoff Numbers

Search Add New Group Design

Group Design Name	Description	Actions
General Lottery	Default lottery configuration - students will be placed in one single group for the grade level	
Ice Cream Flavor	Split students by ice cream	 
Test 2	This is a test	 

Similar to Lottery Groups, a default General Lottery design is loaded to all orgs and cannot be edited or deleted

The default design is used for all newly created orgs and programs by default

Lottery Groups - Create Group Design & General Lottery Group

Sean Finerty | Olive Academy

My Account School Year 2021-2022

Settings Lotteries Lottery Group Designs Add New

Manage Lotteries

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries**
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Sync Service
- Boundaries
- Internal
- Migration Import

Lottery Group Designs: Add New

Group Design Name: Ice Cream Lottery Group Description: Split students by ice cream flavor

Groups can be added and arranged
- Students are placed in the first group they match
so order is VERY important

Create group design. Students will be assigned to the first group they match in this order:

- 1**
Configure Group
Select Group: Chocolate
Add Subgroup
- 2**
Configure Group
Select Group: Vanilla
Add Subgroup
- 3**
General Lottery Group
The General Lottery Group is a catch-all group for students who didn't get into any of the other groups in this design.
Default General Lottery will ALWAYS be last as a catch all

Click to add Group

Cancel Save Group Design

Need Help?

Configure Lottery Groups - Group Design w/ Sub Groups

Create group design. Students will be assigned to the first group they match in this order:

1

Configure Group

Select Group
SPED Services

Students will be assigned to the first subgroup they match in this order:

Select Subgroup 1
Chocolate

Select Subgroup 2
Vanilla

Select Subgroup 3
Strawberry

Add Subgroup

2

Configure Group

Select Group
Chocolate

Add Subgroup

3

Configure Group

Clicking Add Subgroup adds additional options

- If student matches the main group, the system will check the sub groups
- If no match on sub group, system will move to next group

Configure Lottery Cutoffs - By Grade and By Group

Elementary Schools: **Magnet**

Fir Elementary - STEM

Grade	Cutoff Numbers	Current	Available
K	20	10	10
1	20	14	6
2	20	22	-2
3	20	16	4
4	20	10	10
5	20	12	8
Total	120	88	36

Sycamore Elementary - Performing Arts

K 1 2 3 4 5

Grade	Group	Cutoff Numbers	Current	Available
K	#1 Group Name	20	10	10
K	#2 Group Name	20	14	6
K	#3 Group Name	20	22	-2
K	#4 Group Name	20	16	4
K	#5 Group Name	20	10	10
K	#6 Group Name	20	12	8
1	#1 Group Name	20	10	10
1	#2 Group Name	32	14	6
1	#3 Group Name	20	22	-2
1	#4 Group Name	20	16	4
1	#5 Group Name	20	10	10

Share screen
Web: zpl.ic
App: zpl://
Description
Got any n
Tags
Manage
Grids
Total width
of colum

Default view (if only using the default General group/design)

Cutoff Table if Program uses Custom Lottery Groups
- Repeat each group for the grades
- Show in the order of the group config

Configure Lottery Cutoffs - Grade/Group/Subgroup

Elementary: Magnet Schools

Morgan Maxwell (Open Enrollment)

Pre-K

Cutoff View if using Groups and Sub-Groups, BUT one group does not use sub-groups

Grade	Group	Subgroup	Cutoff Numbers	Current	Available
PreK	Group 1	White/Anglo	20	10	10
PreK	Group 1	African American	20	14	6
PreK	Group 1	Hispanic	20	10	10
PreK	Group 2	Native American	20	14	6
PreK	Group 2	Asian American	20	10	10
PreK	Group 2	Multiracial	20	14	6
PreK	Manually Placed		20	10	10
PreK	Special Ed			10	10
PreK	OE by Address Change			10	10
Total			120	88	36

If some groups don't have a sub-groups, show blank in the sub-group

Configure Lottery Groups - Assign Design to Program

Sean Finerty | Olive Academy

My Account School Year 2021-2022

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings Schools Programs Programs AP Giannini Chinese Immersion

Manage Schools & Programs

Assign Group Design to Program
Settings > Schools & Programs > Add/Edit Program > Lottery Settings Tab

AP Giannini - Chinese Immersion: Edit

Cancel Save Program

PROGRAM INFORMATION PROGRAM ELIGIBILITY APPLICATION SETTINGS **LOTTERY SETTINGS**

Primary Settings

Priority Group
Lottery Testing - Cumulative Extra Entry

Lottery Group Design
General Lottery

Post Lottery Placement
System Default

NOTE Setting is ONLY shown if the feature for custom groups is on

Notification Settings

Parent Notifications:

- Send Accepted/Declined Seat Notifications
- Show lottery results on Parent Dashboard
- Show waiting list number on Parent Dashboard

Accepted Notification
Lottery Results - Offered

Waiting List Notification
Lottery Results - Waiting List

Accepted Placement Notification
Lottery Placement Accepted - Parent Notification

Declined Placement Notification
Lottery Placement Declined - Parent Notification

Cancel Save Program

By default, all programs use General Lottery
Can select from available Group Designs and update

Configure Lottery Groups - Bulk Update Programs

Sean Finerty | Olive Academy

My Account School Year 2021-2022

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings Schools Programs Programs

Manage Schools & Programs

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Programs

Add New Program

Manage the programs available for applications to be filled out.

Hide Disabled Programs

Bulk Action

Search Programs



All School Levels

All Program Categories

			Program Name	Category	Enabled	Accepting Grades	Actions
			AP Giannini - Chines...	Special Applica...	Y	6, 7, 8	Disable
<input checked="" type="checkbox"/>	379	AGSI	AP Giannini - Japane...	Special Applica...	Y	6, 7, 8	Disable
<input type="checkbox"/>	41	AGSI	AP Giannini - Spanis...	Special Applica...	Y	6, 7, 8	Disable
<input type="checkbox"/>	40	AGOE	AP Giannini Open E...	Open Enrollm...	Y	1, 2, 3, 4, 5, 6, ...	Disable
<input type="checkbox"/>	5383	GP	Gianca - Program	Open Enrollm...	Y		Disable

Configure Lottery Groups - Bulk Update Programs

The screenshot displays a web interface for managing programs. A modal dialog titled "Bulk Update Lottery Group Design" is open, showing that 2 programs are selected. The dialog includes a dropdown menu for "Lottery Group Design" with "Ice Cream Flavor" selected. At the bottom of the dialog are "Cancel" and "Update Programs" buttons.

Programs
Manage the programs available for applications to be filled out.

Bulk Action [Dropdown] Search Programs [Input] All School Levels [Dropdown] All Program Categories [Dropdown]

ID	Grades	Actions
<input checked="" type="checkbox"/>	42	[Edit] [Copy] [Disable]
<input checked="" type="checkbox"/>	37	[Edit] [Copy] [Disable]
<input type="checkbox"/>	41	[Edit] [Copy] [Disable]
<input type="checkbox"/>	40	[Edit] [Copy] [Disable]
<input type="checkbox"/>	538	[Edit] [Copy] [Disable]
<input type="checkbox"/>	5192	[Edit] [Copy] [Disable]
<input type="checkbox"/>	957	[Edit] [Copy] [Disable]
<input type="checkbox"/>	66	[Edit] [Copy] [Disable]
<input type="checkbox"/>	65	[Edit] [Copy] [Disable]

Bulk Update Lottery Group Design

Set 2 selected programs to use the following Lottery Group Design:

Lottery Group Design
Ice Cream Flavor

Cancel **Update Programs**

View Lottery Placements

Clear Filters Apply Filters

Grade

Grade: Pre-K

Group 1 > White/Anglo **Group > Sub group** 2 Assigned, 1 Seat(s) Available. Publish by Grade

OFFERED LIST

Rank	ID#	Student Name	Link Sibling	Status	Priorities	Pool	Score	Actions
1	SC87783	Carolyn Perkins	Cady Perkins	✓	4	1	4	Placement
2	SC97452	Margaret Rice	Debra Rice		4	1	4	Placement
	SC87783	Susan Douglas		✗	+	+	+	Placement

WAITING LIST [Bulk Offer](#)

Rank	ID#	Student Name	Link Sibling	Status	Priorities	Pool	Score	Actions
1	SC87783	Gloria Porter	Cady Porter	✓	4	1	4	Placement
2	SC97452	Crystal Kelley			4	1	4	Placement

Special Ed **Group not using a sub-group** 2 Assigned, 0 Seat(s) Available

OFFERED LIST

Rank	ID#	Student Name	Link Sibling	Status	Priorities	Pool	Score	Actions
1	SC87783	Sharon Brooks	Ryan Brooks	✓	4	1	4	Placement
2	SC97452	Gary Alvarez			4	1	4	Placement
	SC87783	Christian Greiz		✗	+	+	+	Placement

WAITING LIST [Bulk Offer](#)

Rank	ID#	Student Name	Link Sibling	Status	Priorities	Pool	Score	Actions
1	SC87783	Diane Morrison	Dylan Morrison	✓	4	1	4	Placement
2	SC97452	Alan Hart			4	1	4	Placement

Grade: K

arecco, 6 versions

Share screen

Web: zpl.io/bJoWRZJ

App: zpl://screen?pid=5e4d...

Description

Got any notes?

Total width: 1024px

of columns: 12

Only show one publish button for the grade NOT for each group/sub-group

View for multiple lottery groups

- Under main section for the grade are many sections for the groups
- If only using a Group, show the Group Name
 - Show the OF and WL tables below
- If using a Group > Sub Group, show the Name of the Group and then > Subgroup
 - Show the OF and WL tables below each Group > Sub Group Combo

Troubleshooting Tips

- If you need to split lotteries into custom groups, you can use this Custom Lottery Group feature
- This was done a lot in SC, but with the custom layer - now we can create and update groups using the rules engine!
- This differs from quotas/%limits in that it creates dedicated offered and waitlists for each group
- If a student is eligible for a group but none of the subgroups, then the student will be evaluated for the next group.
- Apps are assigned to groups & sub-groups in the order they appear on the design
- If app doesn't match any group rules, they will fall in the general lottery group
- Group Designs and Groups are SCHOOL YEAR SPECIFIC since changes to policy can happen
- DO NOT attempt to edit groups and group design AFTER the lottery is run

7. Admin Add Application

To assist parents unable to complete applications, a dedicated flow to add apps is available. This will also allow admins to override restrictions.



Key Points

- Right now, we can create apps for student by using the Login As function, but it's not easily apparent
- Additionally, using Login As shows the exact flow parents see, but there are times that we want to override restrictions to make exceptions
- Finally, we want to build a flow that is easily repeatable for admins with a stack of applications
- This is for creating apps for existing students only

Admin Add Application - Begin App from Student Profile

Sean Finerty | Olive Academy

My Account ▼ School Year 2021-2022 ▼ ⚙️

 SchoolMint Enroll

 Dashboard  Students  Applications  Lotteries  Registrations  Reports  Scheduling  Users

 **Aaron Montplaisir**

 Merge

Change History

Communications Log

Save Student

Profile

Applications

Notes

Transportation Information

Eligibility Information

Ice cream Preferences

Student Applications

There are no applications for Aaron Montplaisir in 2021-2022.
Click on "+ Application" button to start an application for this student.

New button added to create new applications for a student

 Add Applications for Aaron Montplaisir

Available on the
Applications Tab in
the Student Profile

Admin Add Application - Begin App from Student Profile

The screenshot shows the SchoolMint Enroll Admin interface for a student named Sean Finerty. The page displays the student's profile and a list of existing applications. Two '+ Applications' buttons are highlighted with red boxes, and red arrows point from a text box to these buttons. The text box states: "If student already has apps, Admin can still add new apps with these buttons".

Text Box: If student already has apps, Admin can still add new apps with these buttons

Buttons: + Applications (top right), + Applications (bottom right)

Student Applications:

- Open Enrollment Application
- Paul Revere Open Enrollment (Submitted & Eligible)
- Paul Revere - STEM (Submitted & Ineligible)
- Jean Parker - Open Enrollment (Submitted & Ineligible)
- TCS - Open Enrollment (Submitted & Ineligible)
- TCS - Dual Immersion (Submitted & Ineligible)

Navigation: Merge, Change History, Communications Log, Save Student

Profile Menu: Profile, Applications, Notes, Transportation Information, Eligibility Information, Ice cream Preferences

Footer: Need Help?

Admin Add Application - Begin from Guardian Profile

Chad Smith | Olive Academy My Account ▾ School Year 2021-2022 ▾ ⚙️

SchoolMintEnroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Casey Bienvenu

View ▾ Login as a Guardian

Account Information

Students (1)

Notes

Student(s)

🎓 Alexa Bienvenu

+ Applications

Alexa's Open Enrollment Application

TCS - Open Enrollment

✎

● Not Submitted

+ Applications

Admin Add Application - Select Form Process Page

Sean Finerty | Olive Academy My Account School Year 2021-2022

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Add Applications

This page allows admins to select which form process to fill

[Back to Students](#)

Aaron Montplaisir	Birthdate: 01/27/2006	Grade: 9	Guardian(s) No associated guardian accounts
-------------------	--------------------------	-------------	--

Please select the application form you would like to submit

^ Apply to a New School(s) 2 Option(s)

Magnet Application	Start
Open Enrollment Application	Start

In the future
- Descriptions will show
- Alerts to inform admins they are overriding eligibility will show

Admin Add Application - Fill Out Application and Overrides

- Filling out the forms is nearly identical to how it is currently for guardians.
- Admin have additional functionality where they can do various overrides.
 - Override max program application limit
 - Override applying after date allowed.

The screenshot shows a web application interface for managing applications. The browser address bar displays 'qaregx.dev.schoolmint.com/manage/apply/4641700/3176'. The page title is 'Busayo Olukunle | QA Functional Regression'. The user is logged in as 'My Account' for the 'School Year' 2021-2022. The application form is currently on step 5, 'Program Information', which is highlighted in orange. The form is divided into two columns. The left column contains a list of steps: 2. Choice - No selection (checked), 3. Guardian Information (checked), 4. Signature Information (checked), 5. Program Information (active), 6. Rank Choices, 7. Document Information, 8. Additional Information, and 9. Review and Send. The right column displays the details for the selected program, 'Pre School', with a '1 Program(s) Selected' indicator. The details include the address (211 Republic Avenue, Lafayette), distance (1.52 mi), and grades (ECE to K). Under 'Open Enrollment', the 'Early Childhood Education RE' option is checked. A modal dialog box is open in the center, titled 'Choice Limit Reached', with the text: 'Parents can only apply to 1 program(s) in the Open Enrollment for. Do you want to override this limit and make this additional selection?'. The dialog has two buttons: 'No, Cancel' and 'Yes, Override Limit'. Below the 'Pre School' program, the details for 'Barrio Jesus Elementary School - French' are visible, including the address (9283 South Twenty Mile Road, Parker), distance (970.28 mi), and grades (1 to 5). Under 'Open Enrollment', the 'Elementary French Program RE' option is checked.

How do I set up this feature?

Great news - this feature is out of the box and will be available upon install of any new org. Any existing orgs will see this feature available upon the general release of v1.3

8. Additional Smaller Features

Enhancements to the Apply Flow



Parent Apply Flow Updates

- Select Programs View
- Requirements & Policies Editor

Select Programs View

The screenshot shows a web application interface for selecting programs. At the top, there is a navigation bar with 'Dashboard' and 'Messages' on the left, and 'English', 'My Account', and 'School Year 2021-2022' on the right. A sidebar on the left contains a list of steps: '3. Pick Your Programs', '4. Rank Choices', '5. Siblings', '6. About You', '7. Signatures', '8. Scheduling', and '9. Review and Send', each with a green checkmark. The main content area features a search bar 'Search by School or Program Name' and two buttons: 'Filter & Sort' and 'Map View'. Below these are two program cards. The first card is for 'Leonard R Flynn Elementary' and the second is for 'Paul Revere Elementary'. Each card displays address, distance, and grades. Under each card, there is a section for 'Select Program(s) to Apply:' with an 'Open Enrollment' link and a list of checkboxes. The 'Leonard R Flynn Elementary' card has one checkbox. The 'Paul Revere Elementary' card has three checkboxes under 'Special Applications'. A 'Show Less' link is at the bottom of each card. Two red boxes with arrows provide annotations: one points to the 'Open Enrollment' link and checkbox in the first card, and another points to the 'Special Applications' section and checkboxes in the second card.

3. Pick Your Programs ✓

4. Rank Choices ✓

5. Siblings ✓

6. About You ✓

7. Signatures ✓

8. Scheduling ✓

9. Review and Send ✓

Search by School or Program Name

Filter & Sort

Map View

Leonard R Flynn Elementary
Address: 3125 Cesar Chavez, San Francisco
Distance: 0.54 mi [See Map](#)
Grades: PreK3 to 12

Select Program(s) to Apply:

[Open Enrollment](#)

Leonard R Flynn Elementary

Show Less ^

Paul Revere Elementary
Address: 555 Tompkins Avenue, San Francisco
Distance: 0.82 mi [See Map](#)
Grades: PreK3 to 12

Select Program(s) to Apply:

[Open Enrollment](#)

Paul Revere - STEM

[Special Applications](#)

Paul Revere - Chinese Immersion

Paul Revere Open Enrollment

Paul Revere Open Enrollment Copy

Show Less ^

Cards are expanded by default and less prominent button used to expand and collapse

Programs are grouped by Category and Program Category label shown

Requirements & Policies Editor

Sean Finerty | Olive Academy

My Account | School Year 2021-2022

SchoolMintEnroll

Dashboard | Students | Applications | Lotteries | Registrations | Reports | Scheduling | Users

Settings | Forms | Applications | Open Enrollment Application | Edit

Manage Forms

Open Enrollment Application: Edit

Cancel Save Process

Process Parameters

Form Process Name *
Open Enrollment Application

Total Choice Limit *
3

Options

- Show to Parents
- Show to Admins
- Allow Applications to be Ranked
- Separate Category Rankings
- Disable Application Ranking Changes After Submission
- Enable Student Lookup
- Student Lookup Required

Admins can now update the Requirements and Policies snippet in Add/Edit Form Process

Content Snippets & Translations

EN ES TL YO VI PL AR ZH UR

Requirements and Policies:

The questions asked here can affect priorities and determine placement, with the exception of gender, race, and ethnicity. These questions are informational and help us guide recruitment to create a more diverse student body

P 34 WORDS

Need Help?

Neighborhood School Designated for Guardians

The screenshot shows the SchoolMint Enroll dashboard. The top navigation bar includes 'Dashboard', 'Messages', 'English', 'My Account', 'School Year', and '2021-2022'. The main content area is titled 'Pick Your Programs' and shows a progress indicator of 3/7. A sidebar on the left lists steps: 1. Student Information (DE ...), 2. Guardian Info, 3. Pick Your Programs, 4. Rank Choices, 5. Siblings, 6. TEST - Scheduling, and 7. Review and Send. The main content area has a search bar for 'Search by School or Program Name' and a map view. A red box highlights a notification that says 'This is your neighborhood school'. Below this, the details for Paul Revere Elementary are shown, including address, distance, and grades. The 'Select Program(s) to Apply' section lists 'Open Enrollment' and 'Special Applications' with checkboxes for 'Paul Revere - STEM', 'Paul Revere - Chinese Immersion', 'Paul Revere Open Enrollment', and 'Paul Revere Open Enrollment Copy'. The 'Paul Revere Open Enrollment' and 'Paul Revere Open Enrollment Copy' options are checked.

Dashboard Messages English My Account School Year 2021-2022

SchoolMint Enroll

Pick Your Programs 3/7

Next: Rank Choices

Students will get an extra priority for your zoned school if you live within 2 miles of a school you get an additional proximity priority

Search by School or Program Name

Filter & Sort Map View

This is your neighborhood school

Paul Revere Elementary
Address: 555 Tompkins Avenue, San Francisco
Distance: 0 mi [See Map](#)
Grades: PreK3 to 12

Select Program(s) to Apply:

Open Enrollment

Paul Revere - STEM

Special Applications

Paul Revere - Chinese Immersion

Paul Revere Open Enrollment

Paul Revere Open Enrollment Copy

Show Less ^

9. Sync Service

Export student info to SIS or CSV and use enhanced Sync Log pages to track import and export status per student record



Sync Service Updates

- Performance and usability optimizations
- Exports to support registrations/enrollment
- Sync Logs: Import and Export Log pages/features
- Ad hoc imports for student data

Exports

- Exports to support registrations/enrollment
 - Sync to SIS button on approved registration
 - Export via PowerSchool or Aeries immediately
 - Export via SFTP connection queues up until you generate CSV file in Sync Service
- Batch export not in v1.3, targeting 1.4

Registration: [Edit](#)

Sync to SIS

View

[Go to Student Profile](#)

 Jane East

Save Registration

Student ID: 313679 | [Merge Records](#) 

Guardian(s) [Add/Manage](#)

33263: Mallory Prejean

SIS Student ID

Register in:

Fir Elementary School Application linked to this registration: [Fir Elementary School](#)

Re-Registration New Registration


Import Log and Export Log

- New Import Log and Export Log pages/features
- Check the latest import/export status per student record
- See quick count of total records or filtered records
- Filter the student list by status, name, date range, connection...
- Check error info for any failed records
- Download a CSV of Sync Log info for troubleshooting


Sync Logs

Import Dashboard


Showing 1 Results of 1 Imports

0 IN PROGRESS 0 ACTION REQUIRED 0 FAILED 0 PENDING  1 SUCCEEDED

Filter By:

Student Name  Connection Name Error Code

Student ID Sync Status mm/dd/yyyy, --:-- -- mm/dd/yyyy, --:-- --


[Download CSV](#)  [Clear All Filters](#) [Apply Filters](#)

Sync ID	SIS ID	Connection Name	Record Name	Date	Status
2371605	313679	SFTP CSV	Jane East	2021-10-19 09:02:11	SUCCEEDED


Export Dashboard

0 IN PROGRESS 0 ACTION REQUIRED

Filter By:

Student Name  Connection Name Error Code

Student ID Sync Status mm/dd/yyyy, --:-- -- mm/dd/yyyy, --:-- --

[Download CSV](#)  [Clear All Filters](#) [Apply Filters](#)

Sync ID	SIS ID	Connection Name	Record Name	Date	Status
2371606	1287866	SFTP CSV	Melvin Perez	2021-10-19 09:20:03	PENDING

Student ID Imports

- Can now import student data using the Enroll ID (Students.ID) instead of a district id or other identifier

Example: Use the Students.ID identifier to import test scores for students who are in Enroll but are not yet in the district's SIS so don't have a district ID yet.

Ad Hoc Imports and Exports

- Ad hoc for one-time student data import or export
- Immediate process, not part of scheduled nightly job
- No need for an SFTP connection
 - CSV is uploaded, imported, then deleted
 - CSV is configured, generated, then downloaded for export
- Uses Import Mapping/Transformation, Import Log etc
- Save CSV Ad Hoc connection/mapping to reuse later

Field Flags for Null Values

- Previously, a null or blank value in an import would overwrite/wipe out any data in that field in Enroll
 - This feature adds a checkbox per field on the mapping page for the admin to choose whether or not to wipe out existing data when importing a null value
 - Default will be that null values will NOT overwrite data
- NOTE: Customers already importing in production may need to update their import mappings after the release!**

Thank You!

